

Microsoft Partner
Silver Application Development

FIRSTSPORTS

GMS

Request Payment

&

Making Payment

Introduction

If the organisation are set up to take online payments, then it is possible to use the built in email facility which enables the administrators to send out payment request emails. These emails enable the organisations to chase up members to pay for their schemes. The emails include a link, the link (once selected) redirects the individual to an online payment screen. The user can then enter their card details and make payment to the organisation.

Request Payment Emails can be create from the following areas on GMS:

- Creating a New Member
- The Grids
- Finance

1. Creating New Member:

When creating a new member or updating an existing member (see Create New or Update Member guides) Upon assigning a scheme that has a cost associated to it, it is possible to state whether to **Pay Now** or **Pay later**

The screenshot shows the 'Order Summary' and 'Payment Method' sections of the GMS interface. The 'Order Summary' table lists the order details, and the 'Payment Method' section includes a form for entering payment information. The 'Pay Now' button is highlighted with a red box.

Order	Amount	Qty	Total
Order 40263737 Richard Ackroyd 10.00 GBP	10.00	1	10.00
Junior Player (Girls) Junior player (Girls) Mr Richard Ackroyd membership at Chobham RFC			
Sub Total			10.30 GBP

Payment Method

Please check the order items and the final payment amount.
Click the pay button to continue to the payment gateway.

Online Card
 Cash
 Cheque
 Other

* First Name: Richard
* Last Name: Ackroyd
* Email (@/200):
Building:
Number:
1
* Address1:
Hill Close
* City:
Woking
Country:
SURREY
* Postcode:
GU21 4TE
* Country:
ENGLAND

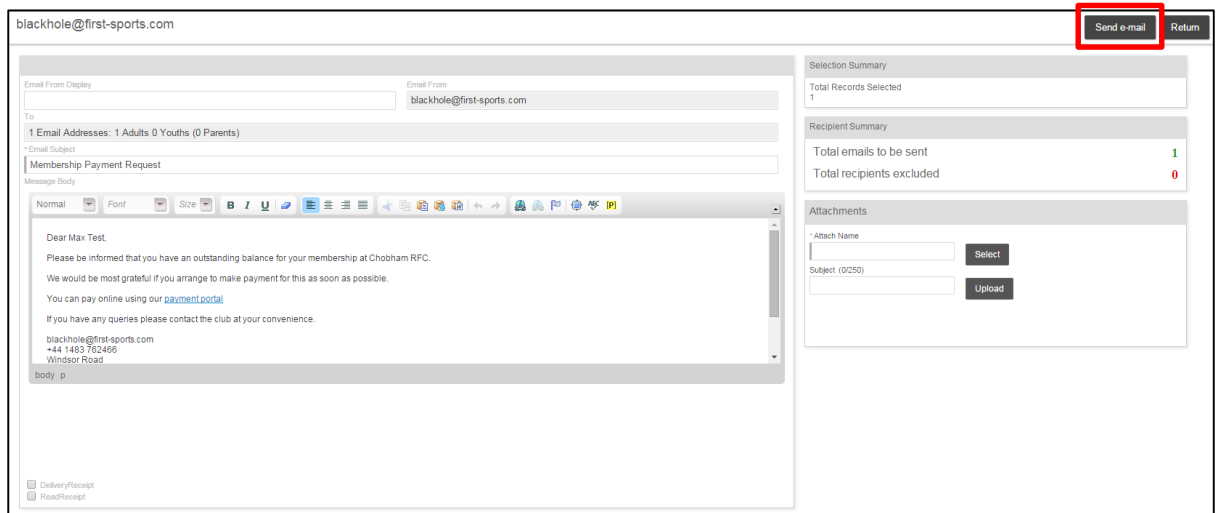
If **Pay Later** is selected, then the system will ask if a Payment Request email should be sent

The screenshot shows a yellow dialog box with a question mark icon and the text 'Send e-mail' and 'Do you want to send a payment request e-mail?'. There are 'Yes' and 'No' buttons at the bottom right.

Send e-mail
Do you want to send a payment request e-mail?

Yes No

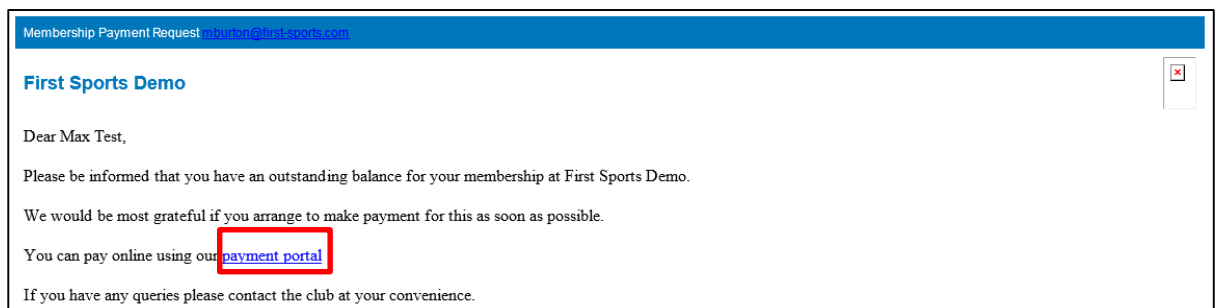
Selecting **Yes**, will load a template email which can be modified and sent to the individual, select **Send**



Until payment is made, the member will remain within the Pending Members grid with an outstanding balance

First Sports Demo											New Member	Export
Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Membership Number	Date Of Birth	Address	Filters		
Social	Donald	Davidson	1828766	Pending	01/09/2015	£10.00		14/05/1975	Street City County AAA 123 Engl...			
Social	Matthew	Lord	898293	Pending	01/09/2015	£541.00		11/07/1981	7 Glencoe Road Test Weybridge KT			
Social	Declined	Payment	1828821	Pending	01/09/2015	£10.30		09/01/1979	200 Whitton Road Twickenham TW.			
Social	Jane	Test	1828832	Pending	01/09/2015	£10.30		01/09/1979	200 Whitton Road Twickenham TW.			
Social	Max	Test	1828807	Pending	01/09/2015	£10.00		09/01/1979	200 Whitton Road Twickenham TW.			
Social	CMS	Test	1828816	Pending	01/09/2015	£10.00		09/01/1979	200 Whitton Road Twickenham TW.			


The email that is received contains a link to the payment gateway, allowing the member to insert a card and payment will be taken



Select **Pay Now**

Order Summary

Cancel Pay Now

Orders		
Order 40283710 Max Test 10.00 GBP Remove Detail		
	Social product Mr Max Test membership at First Sports Demo	10.00 Qty: 1
Sub Total		10.60 GBP

Payment Method

Please check the order items and the final payment amount.
Click the pay button to continue to the payment gateway.

Online Card

*First Name *Last Name

*Email (required)

Building

Number

*Address1

City

County

*Postcode

*Country

Insert Card Details and Select **Continue**

Order Payment

Payment details

Payment Reference: **FSDD635598538018122526**



Amount: **10.30 GBP**

Card Number:

Expiry Date: (MM/YYYY) /

CVV / CVC Number:

Issue Number: (if available)

If your card is identified as being enrolled in the Authenticated Payments Program (3D Secure), you will be forwarded to your Card Issuer's website for identification. After completion of the verification process, you will be directed back to this site to complete the payment process.

Continue

Payment Confirmed

Order Payment

Details

Your order has been completed successfully.


Payment Reference: #F SDD635598538018122526

Please keep a note of your payment reference.

Payment date: 18/02/2015

Payment time: 10:56

40263710

	Social Social product Max Test	Quantity: 1	10.00
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Status: Paid Sub Total **10.30 GBP**

[Print](#)

The individual receives an email to confirm Payment

Payment Success mburton@first-sports.com

First Sports Demo

Order Confirmation for
Thank you for your payment.
Order Ref: 40263710
Transaction date: 18/02/2015 10:56:30
Payment Ref: 79605308

You have paid for: 1 Social Total: GBP 10.300

If you have any queries relating to your products, please contact your administrator

provided by First Sports International FIRSTSPORTS

www.first-sports.com

GMS

Within GMS, the individual has now been moved from Pending Members to the Membership List and the outstanding balance has been removed

First Sports Demo										New Member	Export
Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Membership Number	Date Of Birth	Address	Filters	
Social	Maxwell	CMS	1828827	Active	01/09/2015			09/01/1979	200 Whitton Road Twickenham TW		
Social	Max	Test	1828807	Active	01/09/2015			09/01/1979	200 Whitton Road Twickenham TW		

In Finance the payment is reflected in the dashboard, the payment is now include in **Paid Orders**

First Sports Demo

Transaction Summary			
Orders Outstanding	Orders Outstanding Amount	Paid Orders	Settled Revenue
6	60.60 GBP	8	0.00 GBP
<small>Last Updated 18/02/2015 11:04</small>			

Select Paid Orders and the individual and amount paid is listed

First Sports Demo

Order Reference	Order Date	Order Total	Amount Due	Payment Due	Status	Purchaser First Name	Purchaser Last Name
40263710	09/02/2015	£10.30			Paid	Max	Test

As the payment was made by Card, using the payment gateway the amount is also included in total Card Payments and the Settlement amount, as the money is due to be paid to the club by the online payment provider

Paid Orders

> Cash	30.30 GBP
> Card Payment	51.50 GBP
> (Total)	81.80 GBP
<small>Last Updated 18/02/2015 11:04</small>	

Settlement History (Card Payments only)

01/03/2015	81.80 GBP
<small>Last Updated 18/02/2015 11:04</small>	

2. The Grids:

Via the grids (Everyone & Pending) it is possible to select an individual or multiple individuals and send them a payment request email. From the grid, select who to email, select **More** and **Request Payment**

First Sports Demo										Selected 3	Add To Group	Export	Send e-mail	Buy Membership	More ▾
Membership Type	First Name	Last Name	RFU Id	Status	Renewal Date	Balance	Membership Number	Date Of Birth	Address						
social	Donald	Davidson	1828766	Pending	01/09/2015	£10.00		14/05/1975	Street City County A...	Request Payment					
social	Matthew	Lord	898293	Pending	01/09/2015	£541.00		11/07/1981	7 Glencoe Road Test V	Apply For DBS					
social	Declined	Payment	1828821	Pending	01/09/2015	£10.30		09/01/1979	200 Whitton Road Twi	Remove From Club					
social	Jane	Test	1828832	Pending	01/09/2015	£10.30		01/09/1979	200 Whitton Road Twi	Update Membership					
social	CMS	Test	1828816	Pending	01/09/2015	£10.00		09/01/1979	200 Whitton Road Twi	Delete Membership					

The process is the same as above. An email is sent to the individual(s) and they can select a link and pay the outstanding balance

3. Finance

Via the Finance module, an administrator can also track which individuals owe money to the club and how much.

Select **Finance**



From Finance and the Dashboard, it is possible to see the total amount of outstanding orders and the total amount owed

Transaction Summary			
Orders Outstanding	Orders Outstanding Amount	Paid Orders	Settled Revenue
6	60.60 GBP	8	0.00 GBP
<small>Last Updated 19/02/2015 11:31</small>			

Both the statistics are hyperlinked. Selecting them will load a list of individuals that owe money to the club

Order Reference	Order Date	Order Total	Amount Due	Payment Due	Balance	Status	Purchaser First Name	Purchaser Last Name
40263756	17/02/2015	£10.30			£10.30	In Progress	Jane	Test
40263746	15/02/2015	£10.30			£10.30	In Progress	Declined	Payment
40263739	14/02/2015	£10.00			£10.00	Pending	CMS	Test
40263625	03/02/2015	£10.00	£10.00	03/02/2015	£10.00	In Progress	Donald	Davidson
40263610	02/02/2015	£10.00			£10.00	Pending	Andrew	Barrett
40263554	26/01/2015	£10.00			£10.00	Pending	Matthew	Lord

Tick who the Request Payment is to be sent to and **Request Payment**

Order Reference	Order Date	Order Total	Amount Due	Payment Due	Balance	Status	Purchaser First Name	Purchaser Last Name
<input checked="" type="checkbox"/>	40263756	17/02/2015	£10.30		£10.30	In Progress	Jane	Test
<input checked="" type="checkbox"/>	40263746	15/02/2015	£10.30		£10.30	In Progress	Declined	Payment
<input checked="" type="checkbox"/>	40263739	14/02/2015	£10.00		£10.00	Pending	CMS	Test
<input checked="" type="checkbox"/>	40263625	03/02/2015	£10.00	£10.00	£10.00	In Progress	Donald	Davidson
<input checked="" type="checkbox"/>	40263610	02/02/2015	£10.00		£10.00	Pending	Andrew	Barrett
<input type="checkbox"/>	40263554	26/01/2015	£10.00		£10.00	Pending	Matthew	Lord

The process remains the same as above. An email is sent with a link where payment can be taken.

4. Making Payment

To make payment for a Membership the individual(s) can complete this in various different ways, these include:

- Cash or Cheque
- Card Payment (at the venue)
- Card Payment (via request payment email)
- Card Payment (logging into GMS and Personal details)

4.1 Cash or Cheque

When creating a new member or updating the payment for an existing member, it is possible to state they paid by Cash or Cheque.

Cancel Pay Now

Order Summary

Orders

Order 40263625 Donald Davidson 10.30 GBP		
Social Social product Mr Donald D Davidson membership at First Sports Demo	10.00 Qty: 1	10.00
Sub Total		10.30 GBP

Payment Method

Please check the order items and the final payment amount.
Click the pay button to continue to the payment gateway.

Online Card
 Cash
 Cheque
 Other

Comments

Cancel Pay Now

Order Summary

Orders

Order 40263625 Donald Davidson 10.30 GBP		
Social Social product Mr Donald D Davidson membership at First Sports Demo	10.00 Qty: 1	10.00
Sub Total		10.30 GBP

Payment Method

Please check the order items and the final payment amount.
Click the pay button to continue to the payment gateway.

Online Card
 Cash
 Cheque
 Other

Cheque Number

Comments

Details can be manually entered and will update the individuals details to set them as paid for their membership. This will also be reflected in the finance module.

4.2 Card Payment (at the venue)

When creating a new member or updating someone with an outstanding balance from the Pending grid, if **Online Card** is the option selected and **Pay Now**

The screenshot shows the 'Order Summary' interface. On the left, under 'Orders', there is one order: 'Social product' for Mr Donald D Davidson, with a quantity of 1 and a price of 10.00 GBP. The 'Sub Total' is 10.30 GBP. On the right, the 'Payment Method' section is active, showing 'Online Card' selected with a radio button. Other options like 'Cash', 'Cheque', and 'Other' are unselected. Below the payment method, there are input fields for 'First Name' (Donald), 'Last Name' (Davidson), 'Email' (sgreen@first-sports.com), 'Building', 'Number', 'Address1', 'Street', 'City', 'Country', and 'County'. A 'Pay Now' button is highlighted with a red box in the top right corner of the form area.

The card details payment screen will appear. If the card holder is present then the card details can be entered and payment taken.

The screenshot shows the 'Order Payment' screen. Under 'Payment details', the following information is displayed: Payment Reference: FSDD635598624798354414; Amount: 10.60 GBP; Card Number: 10000500000185; Expiry Date: 12 / 2015; CVV / CVC Number: 123; Issue Number: (if available). There are two small icons on the right: one for a credit card with '123' and 'CVV' labels, and another for a debit card with '3' and 'ISSUE NUMBER' labels. A blue 'Continue' button is located at the bottom right of the form.

4.3 Card Payment (via request payment email)

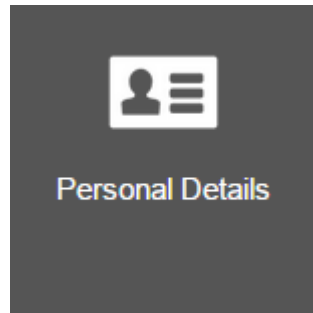
See above for example

4.4 Card Payment (logging into GMS and via Personal Details)

Any individuals at the club can have a username and password to log into GMS. Access will be limited to the Personal Details module only, unless they have been assigned certain roles at the club.




However, having access to Personal Details, enables that individual to manage their data and importantly pay for any outstanding balances.

Upon signing in, select **Personal Details**



Select the **Outstanding Balance**

Mr Max Test

Profile										
<table border="1"> <thead> <tr> <th>Details</th> <th>Contact</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>  <p>Mr Max Test Date Of Birth: 01/01/1979 Gender: Male Status: Active</p> </td> <td> <p>Address: 200 Whitton Road, Twickenham, ENGLAND, TW2 7BA Phone: (0) 1932 213300 Email: mburton@first-sports.com</p> </td> <td> <p>Status: Active Created: 15/01/2015</p> </td> </tr> <tr> <td colspan="2"> <p>Money Outstanding</p> <p>> GBP 11.30</p> </td> <td></td> </tr> </tbody> </table>		Details	Contact	Status	 <p>Mr Max Test Date Of Birth: 01/01/1979 Gender: Male Status: Active</p>	<p>Address: 200 Whitton Road, Twickenham, ENGLAND, TW2 7BA Phone: (0) 1932 213300 Email: mburton@first-sports.com</p>	<p>Status: Active Created: 15/01/2015</p>	<p>Money Outstanding</p> <p>> GBP 11.30</p>		
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<p>Money Outstanding</p> <p>> GBP 11.30</p>										

Select **Pay Now**

Order Summary

Orders	Payment Method												
<p>Order: 40283676 Max Test 10.30 GBP</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Price</th> <th>Qty</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Testing Testing Mr Max Test membership at Liskeard-Looe RFC</td> <td>10.00</td> <td>1</td> <td>10.00</td> </tr> <tr> <td colspan="3">Sub Total</td> <td>10.60 GBP</td> </tr> </tbody> </table>	Item	Price	Qty	Total	Testing Testing Mr Max Test membership at Liskeard-Looe RFC	10.00	1	10.00	Sub Total			10.60 GBP	<p>Cancel Pay Now</p> <p>Please check the order items and the final payment amount. Click the pay button to continue to the payment gateway.</p> <p><input checked="" type="radio"/> Online Card</p> <p>*First Name: Max *Last Name: Test *Email (24/200): mburton@first-sports.com Building: _____ Number: 200 *Address 1: Whitton Road *City: Twickenham County: _____ *Postcode: TW2 7BA *Country: ENGLAND</p>
Item	Price	Qty	Total										
Testing Testing Mr Max Test membership at Liskeard-Looe RFC	10.00	1	10.00										
Sub Total			10.60 GBP										

Insert **Card Details**

Order Payment

Payment details

Payment Reference: **FSD635598624798354414**



Amount: **10.60 GBP**

Card Number:

Expiry Date: (MM/YYYY) /

CVV / CVC Number:

Issue Number: (if available)

If your card is identified as being enrolled in the Authenticated Payments Program (3D Secure), you will be forwarded to your Card Issuer's website for identification. After completion of the verification process, you will be directed back to this site to complete the payment process.

[Continue](#)

The order is paid

Order Payment

Details

Your order has been completed successfully.


Payment Reference: **#F SDD635598624798354414**

Please keep a note of your payment reference.

Payment date: **18/02/2015**

Payment time: **13:21**

40263676

	Testing Testing Max Test	Quantity: 1	10.00
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Status: Paid Sub Total **10.60 GBP**

[Print](#)

A confirmation email is sent

Payment Success mburton@first-sports.com

First Sports Demo

Order Confirmation for
 Thank you for your payment.
Order Ref: 40263710
Transaction date: 18/02/2015 10:56:30
Payment Ref: 79605308

You have paid for: 1 Social Total: GBP 10.300

The balance is removed from Personal Details

Mr Max Test

Profile

Details	Contact	Status								
<div style="display: flex; align-items: center;"> <div> <p>Mr Max Test</p> <p>Date Of Birth 01/01/1979</p> <p>Gender Male</p> <p>Status Active</p> </div> </div>	<p>Address 200 Whitton Road Twickenham ENGLAND TW2 7BA</p> <p>Phone (0) 1932 213300</p> <p>Email mburton@first-sports.com</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-bottom: 1px solid #ccc;">Status</td> <td style="text-align: right;">Active</td> </tr> <tr> <td style="border-bottom: 1px solid #ccc;">Created</td> <td style="text-align: right;">15/01/2015</td> </tr> <tr> <td colspan="2" style="border-bottom: 1px solid #ccc;">Money Outstanding</td> </tr> <tr> <td style="border-bottom: 1px solid #ccc;"></td> <td style="text-align: right; border: 2px solid red;">0.00</td> </tr> </table>	Status	Active	Created	15/01/2015	Money Outstanding			0.00
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Created	15/01/2015									
Money Outstanding										
	0.00									